

New Version of EKOS (V3.3.02)

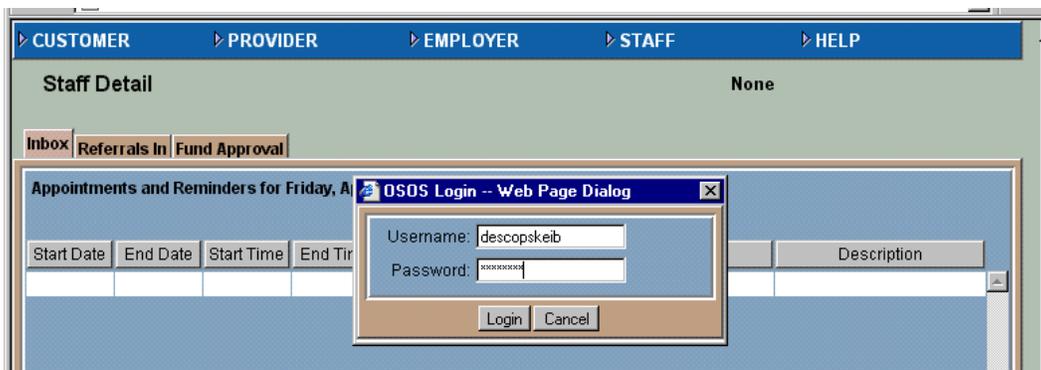
V3.3.02 will be loaded into Mediated Production the weekend of May 21/22, 2005. EKOS will be taken down at noon on Friday, May 20 to begin the process and will be available again on Monday May 23. If you encounter problems accessing the new version please contact the Cabinet Helpdesk toll free at 866-520-0002 or locally at 564-9216. You can also contact the following EKOS Support Helpdesk staff: [Michele Belcher](#), [Sharon Burchett](#), [Tony Cagle](#), [Judy Dean](#), [Gregory Dempsey](#) and [Toddy Worley](#) or email the EKOS Support Team mailbox at: ekos.project@ky.gov.

Logging on to EKOS

The initial log-in process remains the same in V3.3. From the Staff Module click on “Login”.



A Pop-Up Window will be displayed, enter your Username and Password then click on the “Login” button. This will always log you into your Primary Office.



Staff Preferences

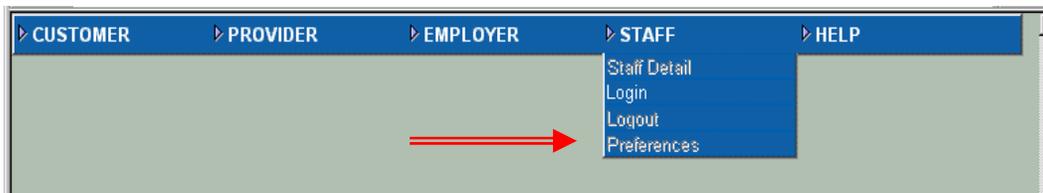
The new Preferences feature in EKOS allows a staff person that works in more than one office location to enter activities and services for the office where the work is performed. When you click on Preferences from the Staff Module a page will be displayed that shows your Primary Office, Current Office and a drop-down field labeled “Change Office To” and a “Change Office” button. This is also the page where you will now change your EKOS Password. For security purposes it is recommended that you change your Password on a monthly basis.

Staff Preferences (continued)

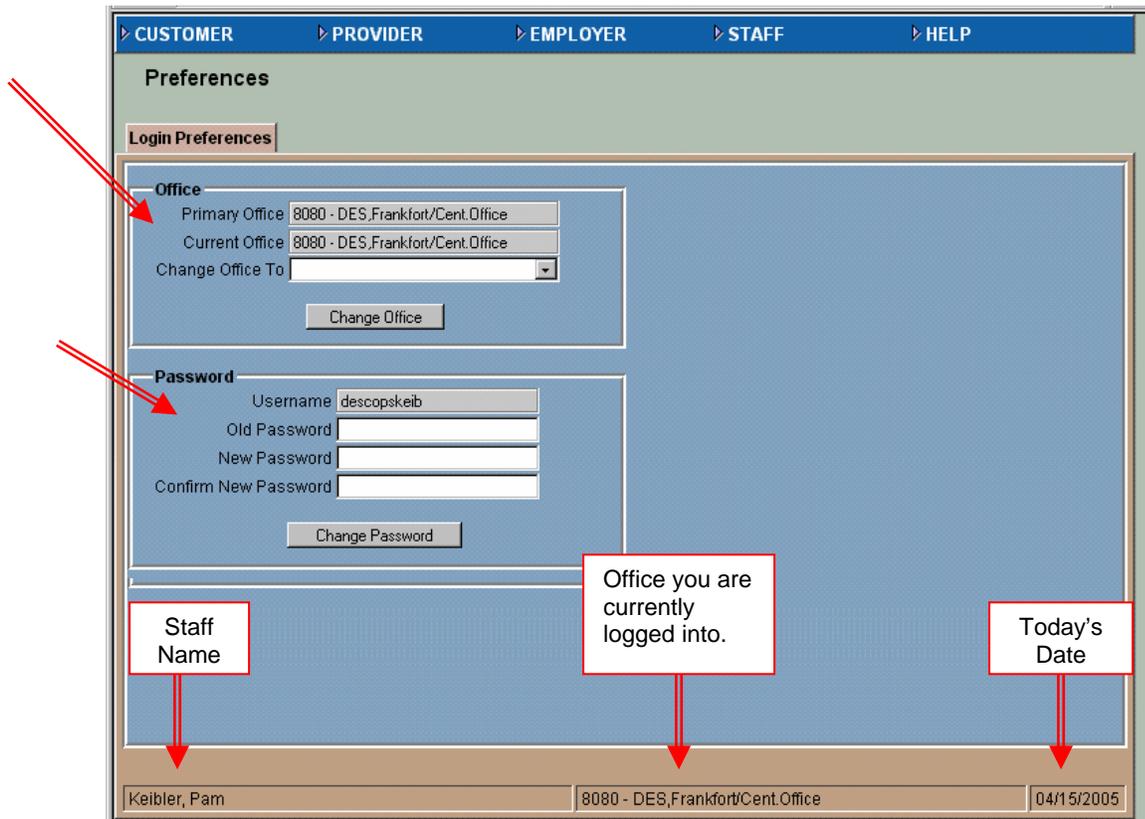
- ◆ Your Primary Office will always be your default office and is normally the office in which you spend the greater amount of time or is the main Local Office or Comprehensive One-Stop Center to which you are associated.
- ◆ The Current Office will display the office you are currently logged into, which can be your Primary Office if you have not changed it or it will display the new office you have logged into.

Note: Because this process could only be started after loading v3.3 into Production we will not have everyone set up on May 23rd when you will begin using the new version. A notification will be sent to inform you when this effort has been completed. The Offices that will be displayed in your Preferences will be those offices in your Administrative Area or WIA. If there is ever a time when you will need to work in another office please notify the EKOS Team and that office will be added to your Preferences immediately.

Screen Shot #1



Screen Shot #2

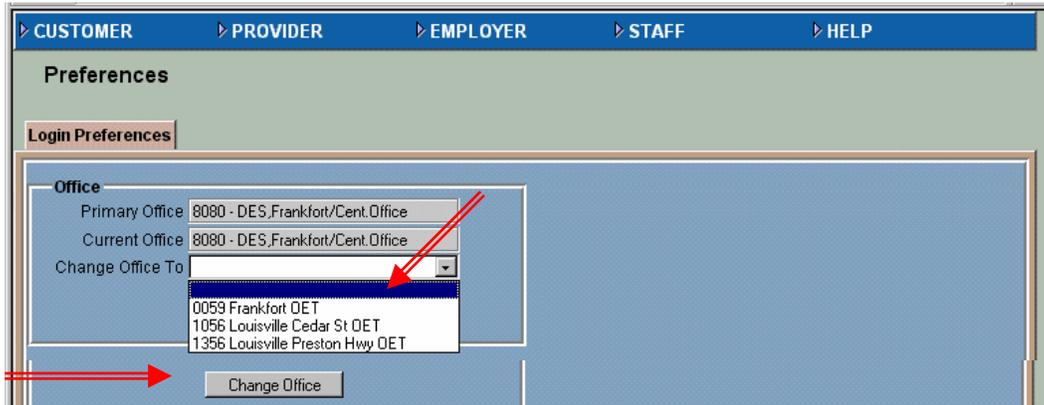


The staff person's name and office associated with their current login will be displayed on each page throughout the application. Today's date is also displayed in the right corner of the page.

Changing Your Office Location

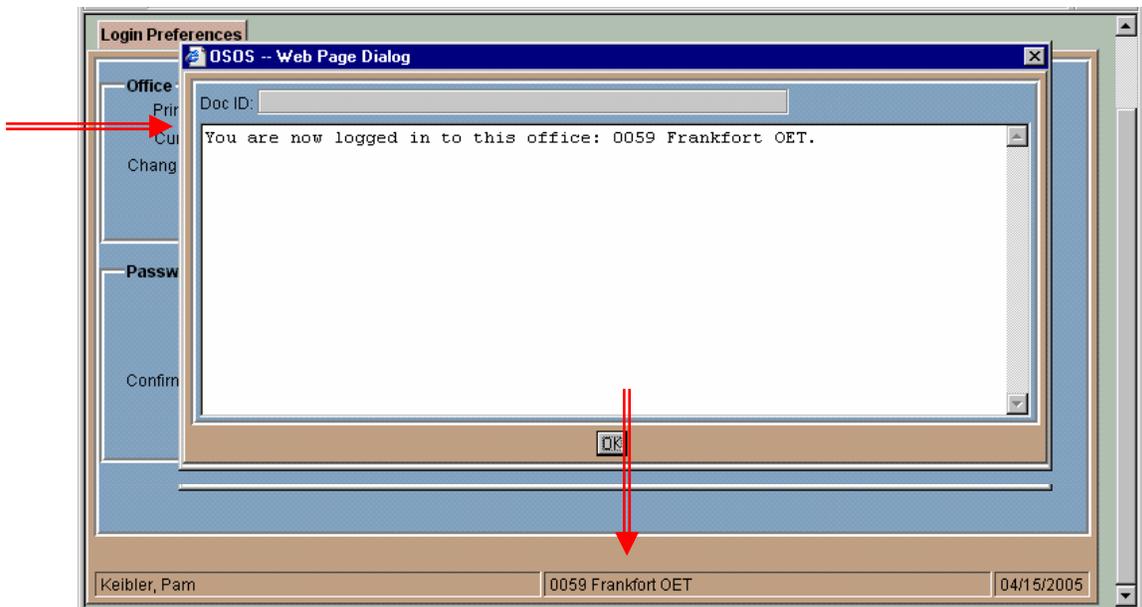
When you are working in an office other than your Primary office you will log into Preferences and click on the drop-down menu arrow. The list of offices that has been assigned to you will be displayed in the drop-down. Click on the office you will now work out of **AND** click on the "Change Office" button. (See Screen Shot #3)

Screen Shot #3



Once you make your selection and click on the "Change Office" button a Pop-Up Window will be displayed telling you that you are now logged into another Office Location. Your new office location will now be displayed at the bottom of the screen and throughout the application. If you accidentally select the wrong office or you are going to work in another office that same day, return to the Login Preferences screen displayed above and make a new selection. You should always get the Pop-Up Window message telling you that you are now logged into a new office. The office you are currently logged into will always be displayed at the bottom of the page. (See Screen Shot #4)

Screen Shot #4



Historical Office

A search field has been added on the Customer Search General Info Tab labeled "Historical Office". The Historical Search allows you to search for customers that are currently and/or previously been provided services and/or activities at any time in your office. This includes any customer associated to your office through Assigned Office on Customer Detail, Provider Service, Job Referral, Inter-Agency Referral and Program Enrollment/Exit. **NOTE:** There is a time lag between the time you enter an Activity or Service and when it is displayed in a Historical Search.

Examples of use: A search for your office using the "Historical Office" search allows you to search for all Veterans, UI Claimants, Trade participants, Migrant Farmworkers, etc., served in your office within a specific timeframe. You can use any of the additional search criteria in conjunction with your office.

The screenshot shows the 'Customer Search' interface with the 'General Info' tab selected. The 'Historical Office' dropdown menu is open, showing a list of office locations. A red arrow points to the 'Historical Office' field. Below the dropdown is a table of search results.

SSN	Vet	Status	Seeker Name	Objective
160-52-9187	Yes	Active	Bigelow, Sherene R	Property Management- On site or off site day to day managem
382-64-3640	Yes	Active	Deshler, Michael S	To obtain full time employment.
410-02-3663	Yes	Active	Lendermon, Richard L	Seeking a permanent position with an organization that can re

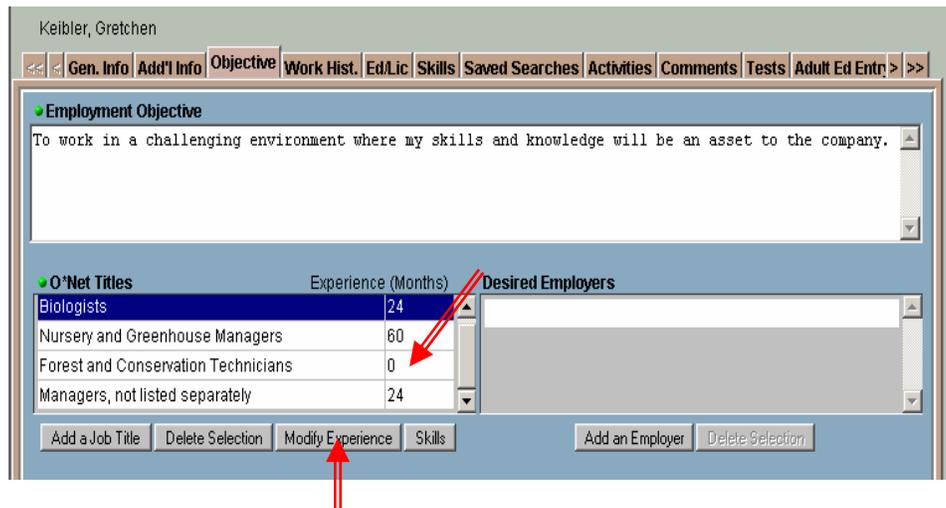
The screenshot shows the 'Customer Search' interface with the 'Programs' tab selected. The 'Programs/Public Assistance' dropdown menu is open, showing a list of programs. A red arrow points to the 'Programs/Public Assistance' field. Another red arrow points to the 'Search' button. Below the dropdown is a table of search results.

Objective

Modify Experience

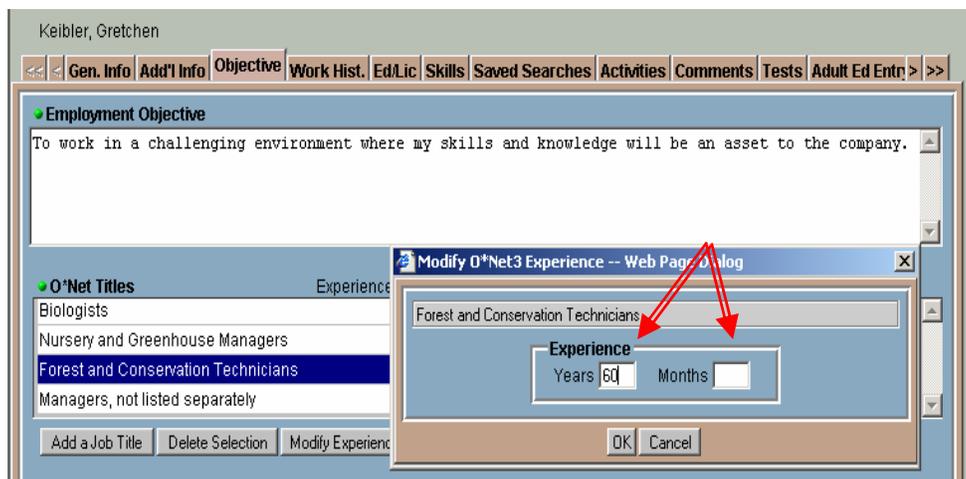
You can now modify/update a customer's Yrs/Mths Experience for an O*Net Occupational Title in EKOS. To edit the Experience (Months) field displayed on the Customer Detail Objective page click on the O*Net Title to highlight and then click on the "Modify Experience" button. In the example the Months Experience is 0 for the selected O*Net Title. (See Screen Shot #1)

Screen Shot #1



When you click on the "Modify Experience" button a pop-up window will appear displaying fields for "Years" and "Months". In the "Years" field you can enter a maximum of 60 years of experience. In the "Months" field you can enter up to 11 months of experience. Once you have made your change/update click the "OK" button. (See Screen Shot#2)

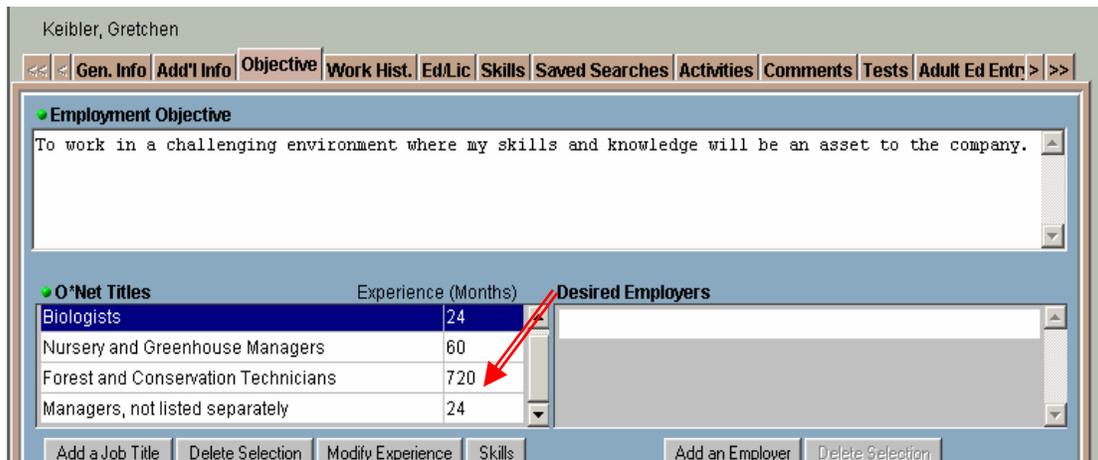
Screen Shot #2



Modify Experience (continued)

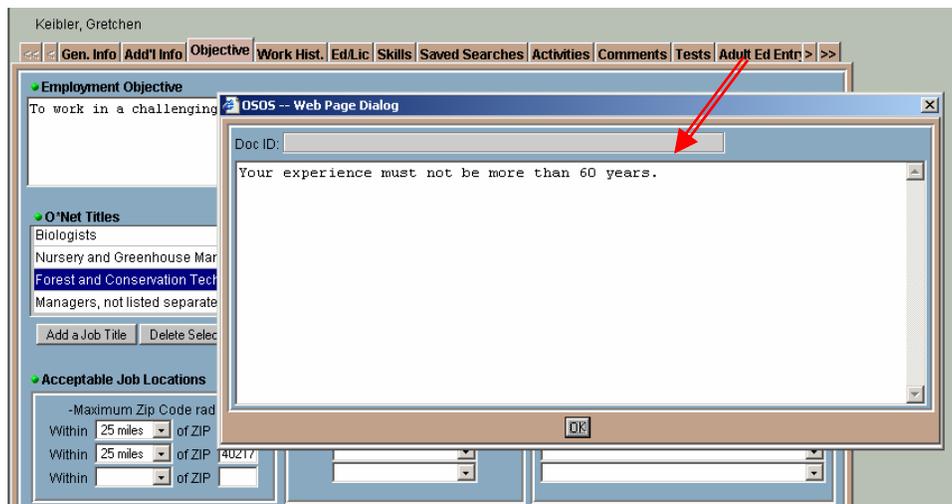
Once you click "OK" you will be returned to the O*Net Title that will now display your changes. *Don't forget to click the "Save" button to save your changes to the record.* The system converts years of experience to months when it is displayed with the O*Net Occupational Title. Notice that the 60 years of experience you entered is now displayed as 720 months. (See Screen Shot #3)

Screen Shot #3



Years and Months of Experience Rule

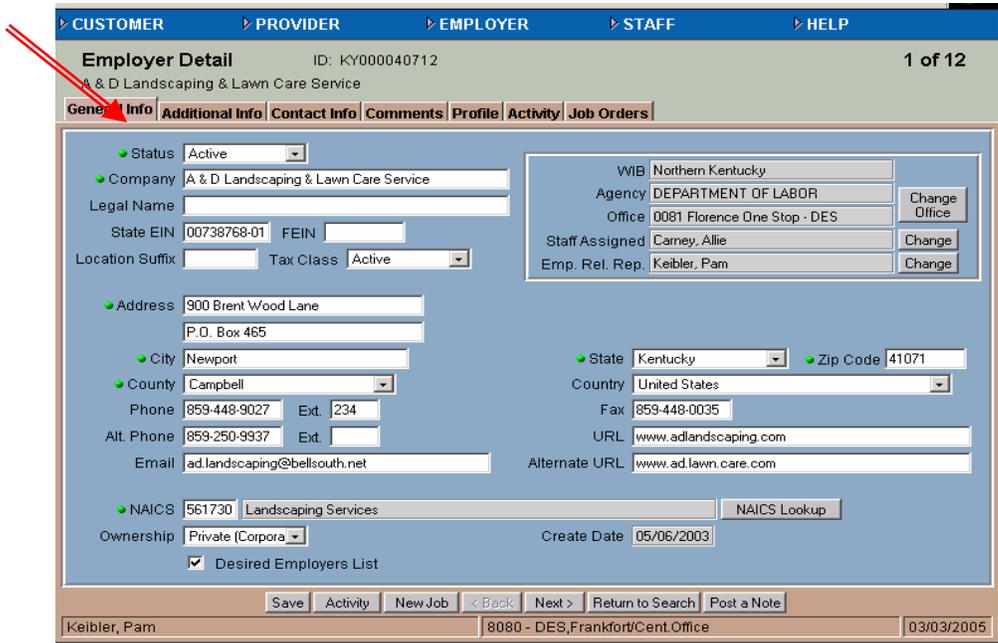
If you attempt to enter a number of years experience greater than 60 you will receive an error message stating, *"Your experience must not be more than 60 years."*



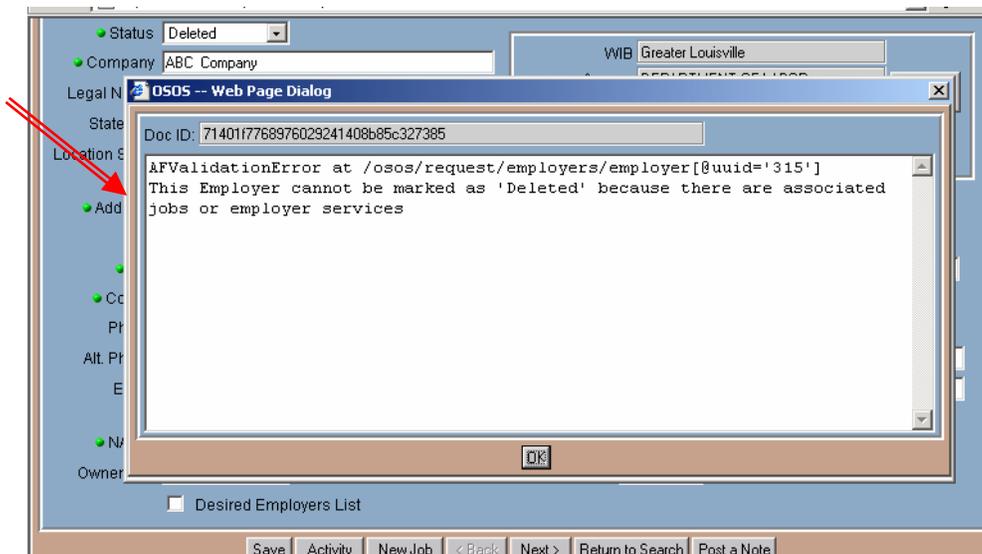
The Self Service Module has also been modified to allow the Customer/Job Seeker to include the amount of past experience with each desired job title listed in the Occupation page of Resume Builder. When the Job Seeker makes a change or adds experience this change will be reflected in EKOS Mediated.

Employer Status

A new field has been added to the Employer Detail General Info Tab that allows you to designate the "Status" of the employer registration. The registration can have a status of Active, Inactive, Deleted, or Archived. You should only use an Employer registration that is in Active status to generate a job order. You will not be allowed to add employer services or job orders to Employer records that are marked as Inactive, Archived or Deleted. If you have employer registrations that are not valid or are duplicates you can change those records to "Deleted" status **ONLY** if there are no job orders and/or employer services attached to that registration. If the registration cannot be deleted because it has job orders or services connected to it you should make the registration "Inactive".



If you attempt to change an Employer registration to "Deleted" and there are job orders or employer services attached you will receive the following error message.



Employer Status Search

A new field has been added to the Employer Search General Info Tab that allows you to search for employers based on their registration status. You can search for employer registrations that have a status of Active, Inactive, Deleted, or Archived.

The screenshot shows the 'Employer Search' interface with the 'General Info' tab selected. A dropdown menu for the 'Status' field is open, showing options: Active, Archived, Deleted, and Inactive. A red arrow points to the 'Active' option.

Employer URL

Two new fields have been added on the Employer Detail General Info Tab to allow the entry of the company's URL and an Alternate URL. The URL fields can be used to identify the employer's home page or their human resources page. A URL is entered in the following format: <http://www.company.com>. Up to 200 characters are allowed in this field. A Job URL field has also been added to the Job Order for use as a contact method for the Job Order.

The URL information will be available in Mediated Production for staff and for customers in the Self Service Module on the "How to Apply" sections.

The screenshot shows the 'Employer Detail' form for 'A & D Landscaping & Lawn Care Service'. The 'General Info' tab is selected. The 'Status' is 'Active'. The 'Address' field is '900 Brent Wood Lane, P.O. Box 465, Newport, Campbell, Kentucky 41071'. The 'URL' field is 'www.adlandscaping.com' and the 'Alternate URL' field is 'www.ad.lawn.care.com'. Red arrows point to these two fields.

Job Order

The Job Order General Info Tab layout has changed with v3.3. The fields have been arranged to make the job order easier to read and to allow the information to be presented in a more logical sequence.

The screenshot shows the 'Job Order Detail' screen for Order# KY0111892 and ID: KY000040712. The 'Employer Information' tab is active, displaying fields for Company (A & D Landscaping & Lawn Care Service), NAICS (561730 Landscaping Services), Order Date (08/07/2003), Status Date (10/06/2003), Status (Closed), Last Open Date (10/06/2003), Category (Regular), O*Net Title (Landscaping and Groundskeeping Workers), Emp. Job Title (Landscape Laborer), Source (Fed), Source (State), Affirmative Action, and Emp Req #. The 'Job Location' tab shows Address, City (Alexandria), State (Kentucky), Zip (41001), and Country (United States). Navigation buttons at the bottom include Save, Duplicate, Emp New Job, Back, Next, Correspond, Print, Emp Detail, Return to Search, Match, Post a Note, and Tag.

Job Order Contact Information

The Contact Info screen layout is also changed in v3.3. Each Contact's information is displayed individually. If there is more than one contact for the Job Order you can select a different contact from the drop-down menu and their information will then be displayed on the page.

Two new fields have been added in Contact Detail, Employer URL and Job URL:

- ♦ The Employer URL is generated from the Employer Registration Screen. This field will be grayed out on the Job Order Contact Detail and cannot be entered or changed on this screen. If you need to make a change or add an Employer URL, click on the "Emp Detail" button to return to the Employer's registration to make the change.
- ♦ The Job URL is generally the Company's Human Resource web site where the Customer/Job Seeker can apply for the job opening by registering with that Employer and/or submitting a resume.

This screenshot shows the 'Contact Detail' screen for the same job order. The 'Contact' dropdown is set to 'Anderson, Rick, Mr.'. The contact information includes Address (900 Brent Wood Lane, P.O. Box 465 Newport Ky 41072), City (Alexandria), State (Kentucky), Zip (41001), Country (United States), Phone (859-448-9027), Fax (859-448-0035), and Email (randerson@bellsouth.net). The 'Employer URL' and 'Job URL' fields are highlighted with red arrows. The 'Contact Method' section has checkboxes for Email, URL, Fax, Phone (checked), Mail, and In Person (checked). A secondary view of the contact details is shown on the right side of the screen.

Custom Tabs

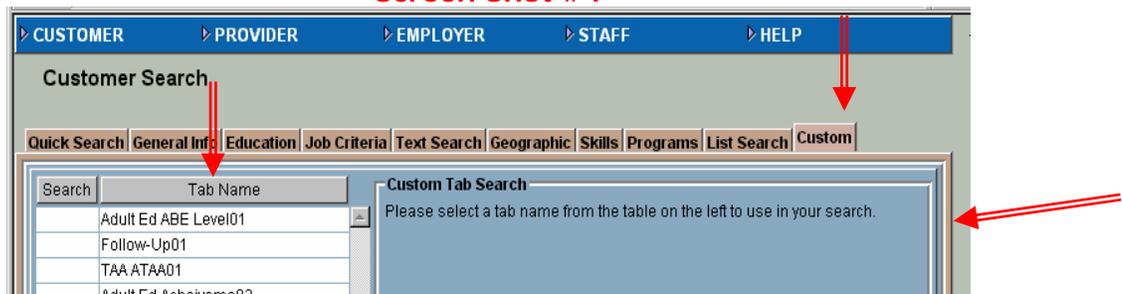
Note: The Tabs currently in EKOS will gradually be changed over the next months to add the additional functionality available with v3.3. There will be a limited number of new Tabs added until after the release of the next version 3.4, which is scheduled for implementation in July 2005. V3.4 will be the version for Common Measures.

Custom Tabs in V3.3 have been enhanced to significantly expand and increase the use and functionality of Custom Tabs. A maximum number of 99 Tabs can be added to the Customer Detail, Comp Assessment, Services, Employer, Job Order, Provider and Offering Modules.

The Customer Module contains three of the Modules that can have their own Custom Tabs, Customer Detail, Comp Assessment and the Services Module. To assist you in identifying which Module a Tab is located each Custom Tab name for the Customer Modules will have an identifier as a part of the Tab name. If the Tab is located in Customer Detail the name will have **CD** as part of the name, Comp Assessment Module will be identified with **CA** and the Services Module will be identified with **SR**. **(This is not shown in the screen shots below but will be added in Production).**

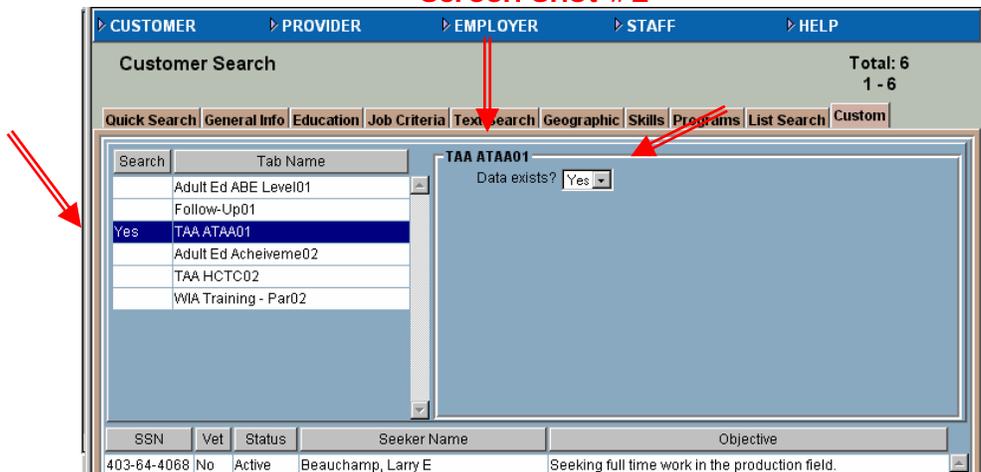
From the Customer Search Module you can conduct a search for all customers that have information entered on a specific Custom Tab. Click on the "Custom" Tab and a list of Tab Names will be displayed to the left of the screen. A message will be displayed under the Heading "Custom Tab Search" instructing you to **"Please select a tab name from the table on the left to use in your search."** Click on the Tab Name to highlight your selection. (See Screen Shot #1)

Screen Shot #1



Once you have highlighted the Tab Name selection it will be displayed on the right side of the screen with a Yes/Null field labeled "Data exists?" Select Yes. "Yes" will then be placed in the column titled "Search" next to the Tab Name you have selected. Click on the "Search" button. (See Screen Shot #2)

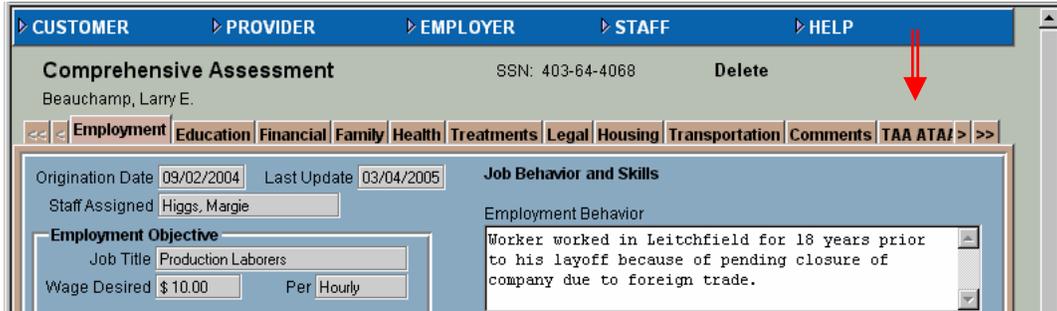
Screen Shot #2



Custom Tabs (continued)

A list of customers associated to your Tab search will be displayed. Click on an individual customer or "Select All" and click on the "Detail" button. The Customer Detail General Info page will be displayed. If the Tab is on the General Info page click on the Custom Tab on that page, if it is a Tab in Comp Assessment or Services you must select those Modules to access the Tab.

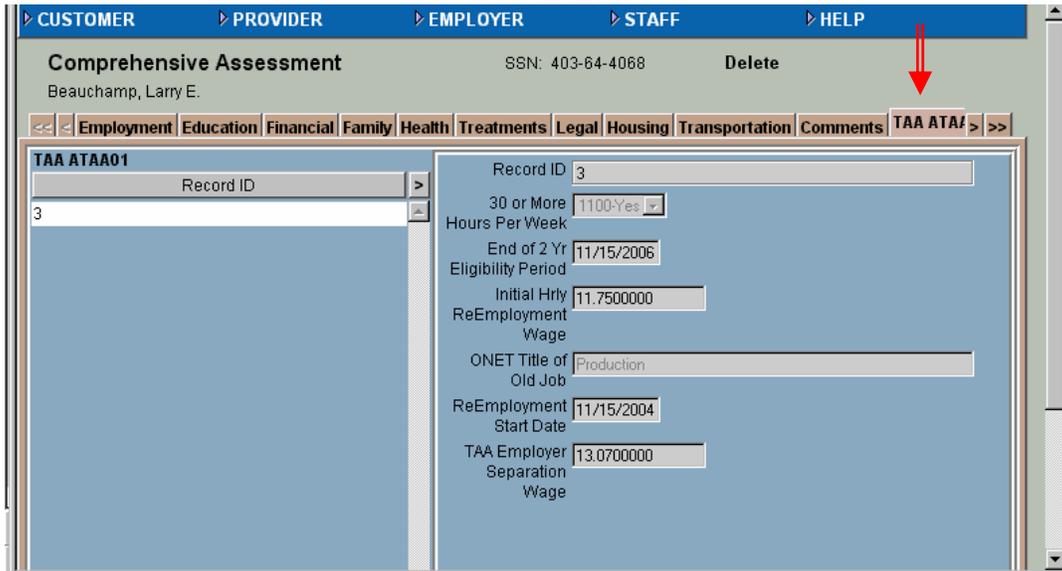
Screen Shot #3



Once you click on the Tab Name on which you are searching (TAAATAA as in Screen Shot #3 above) the screen below will be displayed. To "unlock" the screen click to highlight the Record ID shown in the column to the left.

NOTE: Additional information will be provided on the changes and use of the Custom Tabs.

Screen Shot #4



Enhanced Match Process

Currently when you initiate a Match from the Job Order or the Customer and you do not get the results you expected you have to essentially start the whole process over from the beginning.

New with V3.3 is the ability for staff to clear search criteria fields, change/enter new search criteria and continue the search and match process without breaking the link between Search and Match.

When you click on 'Clear' you will receive one of the following messages, depending on whether you are performing the match from the Customer or the Job Order.

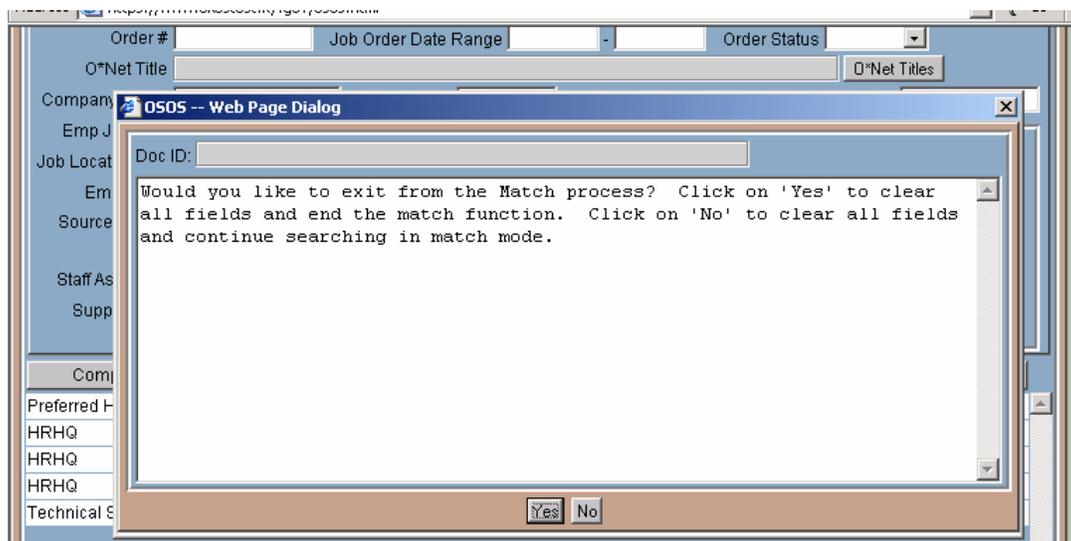
When performing the match from the Job Order you will receive this message:

Would you like to exit from the Match process? Click on 'Yes' to clear all fields and end the match function. Click on 'No' to clear all fields and continue searching in match mode. – message when clicking Clear button from customer search window.

When performing the match from the Customer record you will receive this message:

Would you like to exit from the Match process? Click 'Yes' to clear all fields and end the match function. Click 'No' to clear all fields and continue searching in match mode. – message when clicking on Clear button from job order search window.

Note: When you click 'No' you have cleared all fields and must enter the search criteria you do want to use. Otherwise you will match with all records in the system.



Using the HELP Module

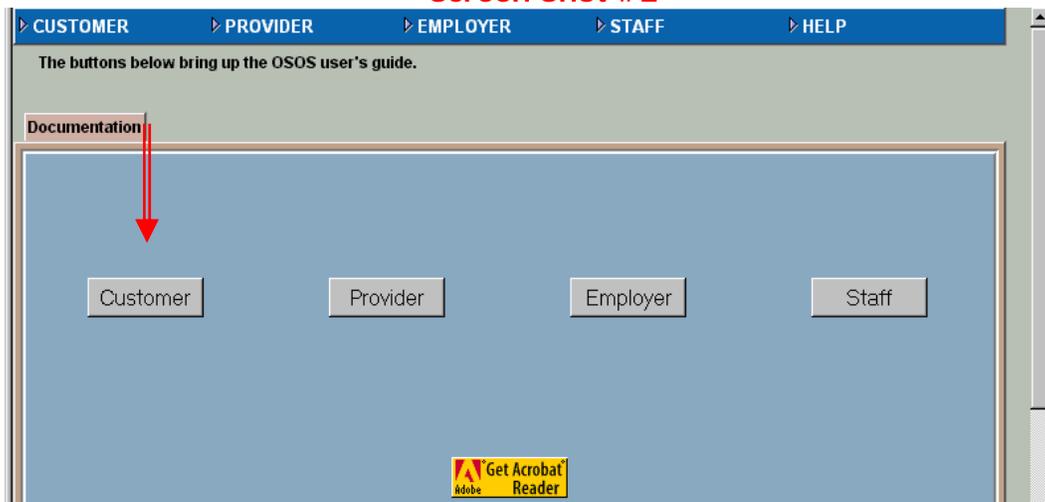
EKOS has an excellent manual in the HELP Module. If you encounter problems or need to review how a process works click on the Help Module and select "System Help".

Screen Shot #1



The Help Module contains help on the Customer, Comp Assessment, Employer, Job Order, Provider, Offering, Services and Staff Modules. This manual is very comprehensive and will always contain the most recent updates.

Screen Shot #2



Screen Shot #3

